



OVERSEAS BUILDINGS OPERATIONS MANAGEMENT INFORMATION FORUM



May 25, 2006 Renaissance Hotel Washington, DC





OBO's Management Information Forum

- Introduction
- Administrative Issues
- Greetings





OBO's Management Information Forum How It Will Be Conducted

- DIR/COO will chair
- Issue Champions (senior staff) will make key presentations (14)
- A question/answer period will follow each presentation
- Minutes will be taken by a professional recorder
- ENR Reporter is here to cover this "first of its kind" event
- Will break for lunch (1200) between sessions





OBO's Management Information Forum Some Quick Facts

- OBO will have a \$14+ billion program going forward
- OBO is now delivering 12 new Embassies/Consulates per year vs. 1 in 2001
- OBO's new construction program is rated 97% effective by OMB
- OBO has achieved a solid "green" status as DOS's overseas Real Property Manager
- The Congress has tripled funding for OBO programs since 2001
- OBO has an award-winning Industry Advisory Panel
- OBO utilizes industry best practices and monthly accountability and performance reviews





OBO's Management Information Forum Some Realities

- OBO's work is in all parts of the world
- OBO's mandate from the Department, OMB, and the Congress is to get our people serving overseas into safe and secure facilities ASAP
- OBO utilizes a standard design D/B delivery method on most projects
- OBO utilizes a firm fixed-price contract and does its own project supervision
- OBO has no favorite firms for design or construction
- OBO has changed the corporate culture for this DOS function
- OBO has a fair and disciplined management focus





OBO's Management Information Forum Why This Forum?

- We must ensure that the new Corporate Culture is understood by all.
- We want open and transparent communication between all parties.
- We want our industry partners to know that the "playing field" is level.
- I want my team to articulate the program's focus as well as I.
- We want you to leave today with total clarity of how our overseas program will be conducted.
- We want you to see a real opportunity to help the U. S. Government and your firm.
- We must ensure that a good and clear contract is in place and <u>all</u> should read it.





OBO's Management Information Forum Williams 20

- 1. MOVE to a true risk allocation process that is fair, clear and acceptable to all parties.
- **2. AVOID** adding a non-traditional scope of work to the general contractor's Design-Build team.
- **3. ALLOW** specialty contractors to perform highly sensitive and special work (separate contract).
- **4. REPRESENT** to the Design-Build team that all "*Rights of Passage*" issues have been handled so they will not impact an orderly construction process. (e.g. host country requirements)
- **5. MOVE** to provide simple, clear and firm RFP language for procurement.
- **6. ENSURE** estimates are derived from empirical data extracted from normal conditions.
- 7. MOVE Value Engineering to the planning phase of Project Development.
- **8. LOOK** for Project Directors who can create and maintain a strong team.
- **9. PAY** more attention to the quality of the Design-Build team's on-site staffing.
- **10. FIX** customer expectations at the pre-construction session and control them through the construction period.





OBO's Management Information Forum Williams 20

- 11. **DELIVER** a building site that is ready for construction now.
- **12. MAKE** the Standard Design (SED) a true "site adaptation" vehicle.
- **13. MOVE** to a "TRUE" Design-Build delivery method for our NECs by providing the Design-Build team a standard design that equals approved construction document.
- **14. INCREASE** emphasis on smart, energy efficient, and sustainable building going forward.
- **15. HELP** bring the procurement team to the "new ways to think, new ways to build" mentality.
- **16. DEAL** appropriately with change orders immediately (set time periods in the early stages of the process).
- 17. **DESIGN** reviews must be expedited and cannot generate requirements that add to scope without identifying funding and allowing time extension.
- **18. CONSIDERATION** must be given to the "how-to" for Operations and Maintenance in the planning phase of our projects.
- **19. ADD** a commissioning staff to the on-site team and ensure that this staff is an active participant in pre-construction.
- **20. BEGIN** to get serious about the use of public-private partnerships to assist with some of our work.



Overseas Buildings Operations

Management Information Forum Ready-to-Build Sites

Keith Wilkie

May 25, 2006





Ready-to-Build Sites The Goal

Ideally, OBO would acquire only sites that are ready-to-build.

- Well-located sites that easily accommodates our planned program with:
 - Roads/Access in place.
 - No additional land acquisition required.
 - Utility infrastructure in place and to the site.
 - No occupants or buildings on site.
 - No environmental, historical or archaeological issues.
 - No third-party claims clear title.
 - No topographic challenges.
 - No subsurface, flood or other natural hazards issues.
 - Zoning/Planning permits and approvals in place.





Ready-to-Build Sites The Reality

Ready-to-Build Sites are not always available.

- Our choices for sites may be limited by:
 - Geography rivers, oceans, mountains
 - Market conditions and land values
- All things considered, the best site to purchase *may not be ready*.
- OBO addresses outstanding issues in various ways:
 - Gain support/assistance from local and national governments
 - Sellers agree to do some work as part of the site acquisition.
 - OBO contracts for portions prior to awarding Design/Build contract.
- In any case, OBO will deliver a site ready-to-build.





Ready-to-Build Sites What OBO Will Deliver

• OBO will provide:

- Planning and zoning approvals for the intended development.
- Host government authorization for USG diplomatic use.
- Host government certification of no known outstanding civil aviation, cultural, historical, archaeological issues regarding the site.
- Site legally registered/titled in the name of the U.S.A.
- Site free of unresolved restitution or 3rd party property claims.
- Subsurface investigations and foundation recommendations.
- Proposed grading plan.
- Survey of boundaries, topography and utilities.
- Easements, rights of way and roadways to provide access.
- Utility infrastructure up to the site.
- Remedies to post-award on-site discoveries.





Ready-to-Build Sites What OBO Will Deliver

Ready-to-Build Sites will be:

- Secured until handover to the design/build contractor.
- Cleared and grubbed.
- Free of environmental hazards.
- Cleared of unexploded ordinance.
- Free of buildings, foundations or other structures.
- Cleared of squatters and any legal occupants.
- Cleared of debris and trash dumps visible on the surface.



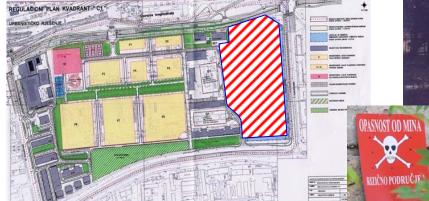


Ready-to-Build Sites Example

Exceptional site - but not "Ready-to-Build". Derelict former university buildings all over site, war-related unexploded ordinance throughout. Operating city steam lines located under the site. Occupants needed relocating, additional road needed.













Ready-to-Build Sites

Example Delivery Solution

Seller contracted for de-mining, demo, clearing, utility relocation, new roads.



















Questions





Overseas Buildings Operations

Management Information Forum Project Planning Discipline

Marcus Hebert





The Disciplined Planning Process

Initial Planning Survey



Integrated Planning Review



Input to the Request For Proposal

Assessment of:

- o Legal & Business Requirements
- o Local Conditions
- o Architecture/Engineering Environment

Includes Project Specific Criteria:

- o Staffing
- o Site Conditions
- o Risk Allocation
- o Standard Embassy Design
- o IPS Results
- o Value Engineering

Products:

- o Blocking and Stacking Diagrams
- o Test-Fit Drawings
- o Site Utilization Diagram
- o Zoning Presentation Package
- Cost Estimate

Provides:

- o Chancery/Annex Floor Plans
- Space Programming
- o Doing Business Criteria





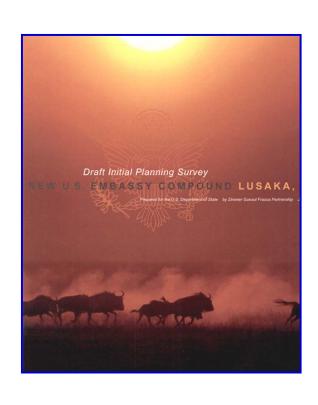
Initial Planning Survey

The **Initial Planning Survey** (IPS) is prepared on each project to understand the local conditions, cost, living, government, etc. that might impact a potential construction project.





Initial Planning Survey



Assessment of:

- Legal & Business Requirements
- Local Conditions
- Architecture/Engineering Environment

Represent...host country requirements Williams #4





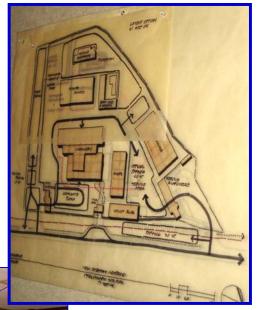
Integrated Planning Review

The Integrated Planning Review (IPR) expands the analysis begun under the IPS and includes, real estate due diligence deliverables, the Space Requirements Program (SRP), a series of site and floor plan diagrams, and cost estimates.





Integrated Planning Review Workshop













Integrated Planning Review

"MOVE" Value Engineering to the Planning process. (Williams #7)







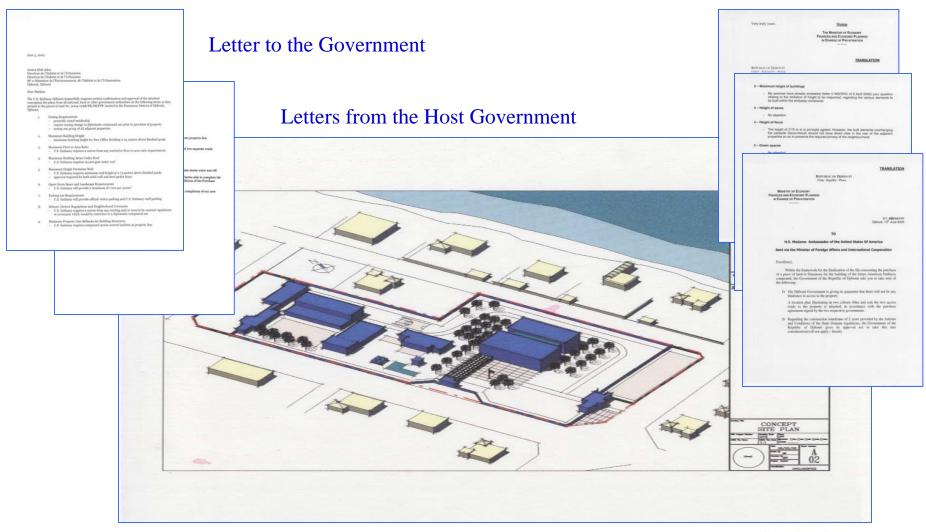
Zoning Package







Host Government Approval



Sample Site Plan





Cost Estimating

- Structured disciplined process that includes Risk Allocation (Williams #1)
- Budget development realistic budget estimates
- Market research addresses local market conditions (Williams #6)
- Cost escalation is researched through various recognized industry resources (Williams #6)





Input to the RFP

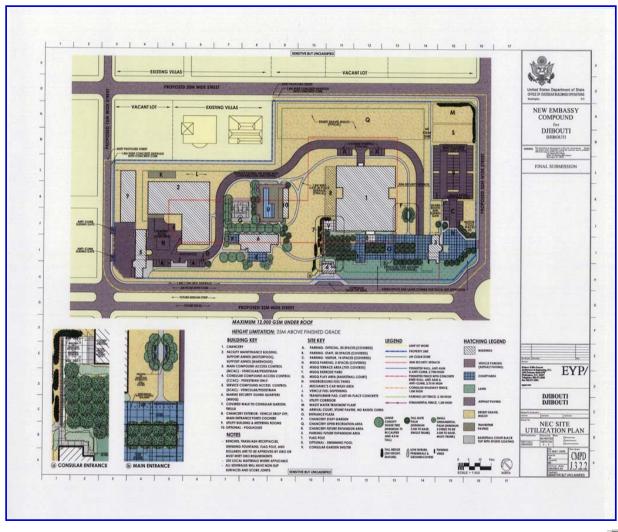
Products developed during the Planning Process incorporated into the Design/Build Request for Proposals:

- Test-Fits plans for Chancery and Annex Buildings
- Site Utilization Diagram
- Tax Relief Criteria
- Due Diligence Surveys, Topographic, Geotechnical, Boundary and Environmental (if required)
- Space Requirements Program
- Other Project Specific Requirements





Input to the RFP Site Utilization Diagram







Input to the RFP Test-Fit

SBU Drawing Not Available





Planning Drives the Budget





Questions





Overseas Buildings Operations

Management Information Forum Standard Embassy Design

William Miner





Standard Embassy Design







Standard Building Sizes



Small Embassy

Typical Size: 4,300 gsm

Construction Cost: \$50 million Design Adaptation: 6 months

Construction Duration: 15 months



Medium Embassy Typical Size: 7,400 gsm

Construction Cost: \$75 million
Design Adaptation: 6 months

Construction Duration: 24 months



Typical Size: 11,300 gsm

Construction Cost: \$97 million Design Adaptation: 8 months

Construction Duration: 28 months





SED Key Features

- Prototype design, site adapted to meet post specific requirements
- Building shell can be expanded or contracted per space requirements program
- Flexible interior permits custom fit-out and future space changes
- Design-Build delivery process results in cost and time reductions
- Standard RFP documents allow contractors to prepare multiple bid packages simultaneously.



Standard Site Master Plan

- Chancery Office Building
- Annex Office Building
- Warehouse/Shops
- Marine Security Guard Quarters
- Staff and Visitor Parking
- Recreation Center
- Site Development and Landscaping
- Compound Access Controls
- Perimeter Security Package







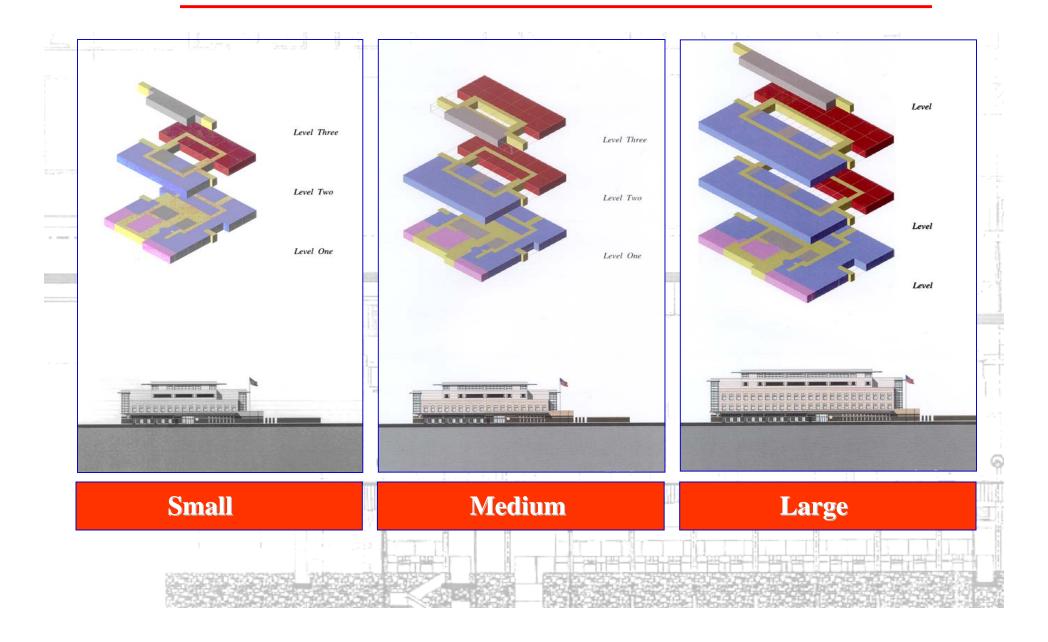
Embedded Best Practices

- Comprehensive Security Measures
- Life Cycle Value Engineering
- Sustainable Site Development
- Building Massing and Orientation
- Sensitive Architectural Expression
- Space Program and Organization
- Accessibility Standards
- Energy Efficient MEP Systems
- Natural Hazards Protections
- Operation and Maintenance Plan.





A Whole Building Solution

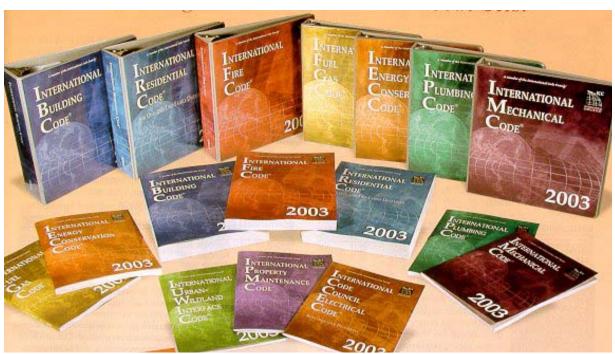




Industry Codes and Standards

The **Standard Embassy Design** (SED) consists of bridging documents ideally suited for **Design-Build** delivery method.

International Building Code has been adopted as criteria with an OBO Supplement for special requirements

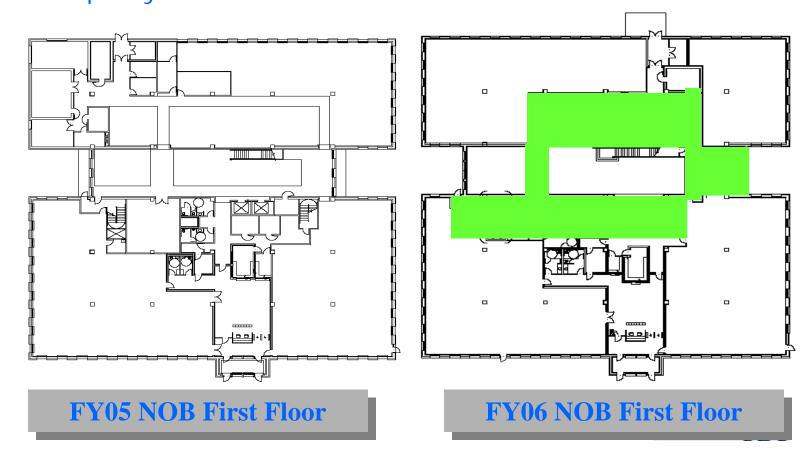






SED Continuous Improvement

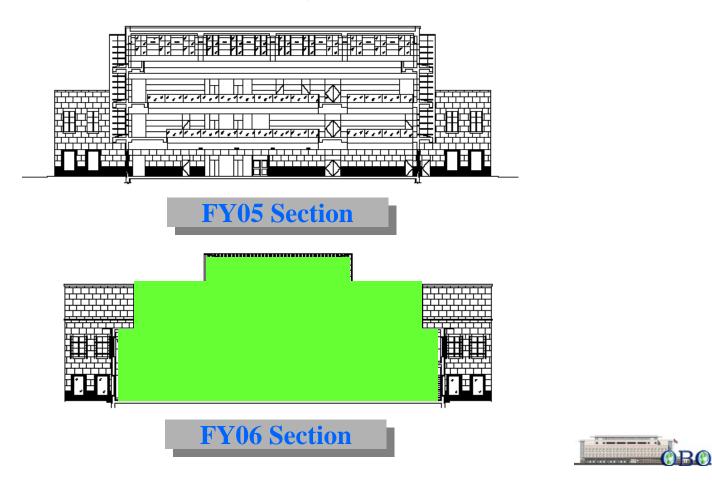
Lessons Learned Program captures feedback from Design Reviews, Contractors' Roundtable and Post Occupancy Evaluations





SED Continuous Improvement

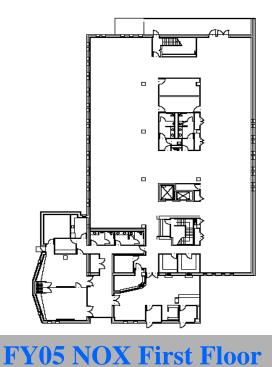
Value Engineering Program takes a close look at building functions and proposes life cycle cost reductions.

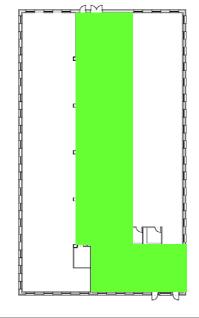




SED Continuous Improvement

Significant design changes have been made to the FY'06 SED. Designers are expected to learn the new requirements and incorporate it in their work





FY06 NOX First Floor

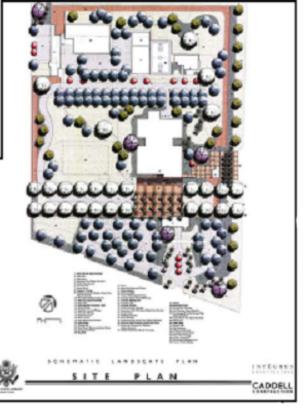




Typical Application - Conakry, Guinea











Questions





Overseas Buildings Operations

Management Information Forum RFP Language/Scope of Work

Nick Retherford





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Overview of the Request for Proposal (RFP) for Solicitation, Offer, and Award of design/build contracts







SECTION A - FORM

A 1 a STANDARD FORM 1442

SECTION B - PRICING

- CONTRACT PRICE CONTRACT LINETTEM NUMBERS/CLINY
- IYPE OF CONTRACT
- COST OF MATERIALS / EQUIPMENT
- GOVERNMENT FURNT (HED PROPERTY/EQUIPMENT

SECTION C - DESCRIPTION/SPECIFICATION/WORK STATEMENT

- PROJECT SCOPE
- DESIGN REQUIREMENTS
- DESIGN PROCESS
- DESIGN DOCUMENTATION
- CONSTRUCTION PROCESS
- POST-CONSTRUCTION Diplomatic Security Accreditation Appendix A. Design Submittel Requirement

SECTION D - PACKING AND MARKING

- MATERIALS SHIPPING ADDRESS
- DEPARIMENT OF STATE MAIL AND COURIER ADDRESSES
- DOCUMENTATION OF SHIPMENTS

- SUBSTANTIAL COMPLETION
- USE OF EQUIPMENT BY THE GOVERNMENT
- FINAL COMPLETION AND ACCEPTANCE OUALITY ASSURANCE AND OUALITY CONTROL
- DESIGN DOCUMENTATION REVIEW
- PROJECT COMMUNICATION

SECTION F - DELIVERIES AND PERFORMANCE

- 53 211-10, COMMENCEMENT, PROSECUTION, AND COMPLETION OF WORK (APR.
- 52 211-10, I COMMENCEMENT, PRO SECUTION, AND COMPLETION OF WORK
- (APR 1984) ALTERNATE I (APR 1984
- 52.211-12_LIQUIDATED DAMAGES—CONSTRUCTION (SEPT 2000) 52 211-13. TIME EXTENSIONS (SEPT 2000)
- 52 242-14 SUSPENSION OF WORK (APR 1984) SCHEDULES
- WORKING HOURS
- EXCUSABLE DELAYS
- DELIVERABLE:
- ASSESSMENT AND APPORTIONMENT OF LIQUIDATED DAMAGES
- PROJECT EXECUTION SCHEDULE
- DOCUMENTATION OF REQUEST # FOR EXTENSION#
- NONCOMPLIANCE WITH CONTRACT REQUIREMENTS
- NOTICES TO PROCEED
- DERIGN RUBMITTAL AND PERFORMANCE REQUIREMENT :

Overview of the Request for Proposal

- Provides detailed contract information
- Establishes requirements for solicitation preparation and pricing
- Establishes terms and conditions of the contract (FAR)
- Establishes contract performance requirements
- Outlines special contract requirements:
 - Security clearance requirements during design and construction
 - Classified document handling during solicitation and post award
- Government furnished materials
- Scope of Work (Section C)
- Attachments to the contract (Section J)





Sections C.1-C.6

NEC NOB Template

STATEMENT OF WORK

Revisions as of 11 May 2006

Section C

Statement of Work
For Design-Build Services
FY06 SED U.S. Diplomatic Mission Compounds
FY06 Post, Country

TABLE OF CONTENTS

C.I PROJECT SCOPE

- C. I. I. Projeci Description
- C.1.2 Project Title
- C.1.3 Site Description
- C.1.4 List of Facilities
- C.1.5 Limit of Constitution C.1.6 Permits and Licenses
- C. 1.7 Local Juris diction Size Planning Agreements
- C.1.8 Coordination with other Contractors

C.2 DESIGN REQUIREMENTS

- C.2.1 General Design Requiremens
 - C.2.1.1 Building Codes and OBO Code Supplements
 - C.2.1.2 SED Documents
 - C.2.1.3 Inserior Space Smackross/Functional Requirements
 - C.2.1.4 Relia bility Centered Maintenance (RCM) Requirements
 - C.2.1.5 Susminable Design
 - C.2.1.6 Telecommunications C.2.1.7 Technical Security System
 - C.2.1.8 Blasi Resisiani Seel Sind Cura'in Wall Sysem
 - C.2.1.9 Fenesimañon
 - C.2.1.10 Blast Resistant Windows and FE/BR Doors and Windows
 - C.2.1.11 Environmenal Security Sysem
 - C.2.1.12 Waivers and Exceptions

C.2.2 Sue Design Requirements

- C.2.2.1 Sandard
- C.2.2.2 Projec (Specific

C.2.3 New Office Building (NOB) Design Requirements

- C.2.3.1 Sandard
- C.2.3.2 Projec | Specific

C.2.4 New Office Annex (NOX) Design Requirements

United States Department of State Bureau of Overseas Buildings Operation Design-Build Services Contract for [FY06 Post, Country] ITEC

[Insert Date of RFP Issuance]

Section C – Statement of Work

- Provides detailed standard information
- Provides detailed project specific information and recommendations
- Provides site description
- Provides overview of utilities
- List of facilities
- Establishes design requirements
- Establishes the design review process
- Determines design documentation
- Establishes submittal requirements
- QA/QC requirements
- Outlines permits and license requirements
- Overviews construction process
- Overviews post construction process





SECTION J - LIST OF ATTACHMENTS

J.1 ADMINISTRATIVE DOCUMENTS

- J11 Di Security Classification Guile for Design & Construction of Overseas Facilities, May 2003
- J1.2 DOS Contractor's Robase Certificate, Apr 1978.
- J13 Standard Form 25, "Performance Bond", May 1996
- J14 Stanlard Form 15A, "Payment Bond", Oct 1998
- J1.5 Sample Bank Letter of Guaranty
- J1.4 Form D\$-1037, "Mailing List Application for Construction Contract." Attachment A to D\$-1037, "Certification Statement."
- J1.7 #E294, "Subcontracting Experton Individual Contract," Sept 20 01
 Submission required Virthe Electronic Subcontract Reporting System (SEES)
- Submission required Visithe Electronic Subcontract Reporting System (#FF)
- Small Business Subcontract Reporting system at www.esrs.gov.

 J19 ACH Vendor/Miscellaneous Payment Emollment Form, Dec 1990
- J110 OBO UNIFORMA! Building Homont Classification System, Inp., 1991
- J111 Contract Security Classification Specification (DD Form 254)
- Original is used with transmittal Letter
 J112 Contractor Association Workshoot August 2004
- J113 Request for Material Product Substitution Form

J.2 DESIGN REQUIREMENTS DOCUMENTS

- J21 OBO International Codes Supplement (OBO-ICS)
- J22 SED NEC Document
- 123 Requirement Integration Package
- J24 Telecommunications Requirement
- J.2.5 Technical Security Requirement
- J.2.6 CommonialProduct Data
- J3.7 Lock and Leave Facility Requirement (Happlicable)
- J.2.3 Reliability Control Maintenance (RCM) Manual
- J.2.9 Warehouse & Support Amer. Application Manual (If Applicable).
- 210 LEED Scorecard

J.3 PROJECT-SPECIFIC DESIGN REQUIREMENTS DOCUMENTS

- J31 Space Requirement Program (SEP)
- J3.2 Site Pleaning Document
- J33 Supplemental Drawings
- J.3.4 OBO Project Specific Division 1 Specifications
- J3.5 Project Specific Classified requirement
- J.3.4 OBO Proposal Price Breaklown.
- J3.7 Host Country Document (If Applicable)

Section J - Attachments

- Establishes attachments to the contract
- Provides Administrative documents:
 - Classification Guidelines for document production and handling
 - Cost estimate format (CSI 16 section)
 - Accreditation worksheet
- Design requirement documents:
 - Code supplements
 - SED documents
 - Technical requirements
- Provides detailed project specific documents





SED Program Description

• SED Overview

- Site Planning
- NOB and Annex
- New Embassy Compound
- Completed SED Projects

• Revised RFP documents

- Section C Changes
- Section J.3 Project Specific Requirements
- Section J.3.2.1 NEC Master Development Site Plan
- Section J.3.2.2 NEC Site Perimeter Plan
- Section J.3.2.9 NEC Site and Building Sections
- Section J.3.3.1 Project Specific Requirements NOB
- Section J.3 Project Specific Requirements Annex





Standard Site Planning







Standard NOB and Annex

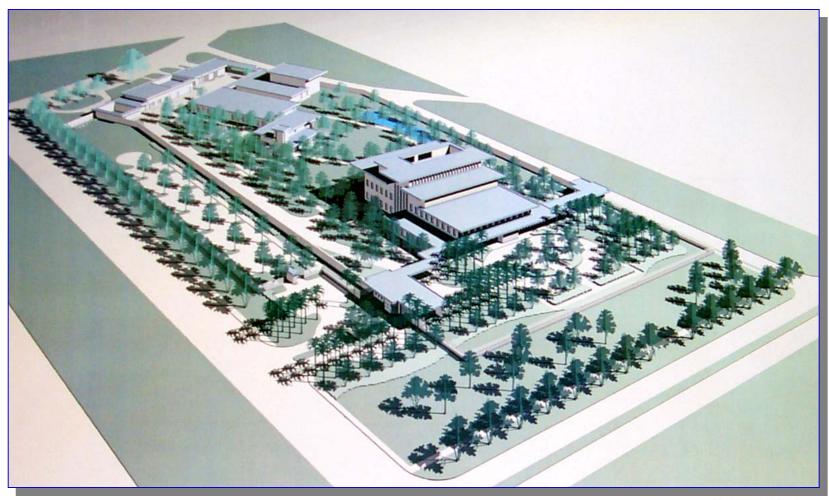


SED Annex





SED New Embassy Compound







Overview of Changes Scope of Work

- OBO Zoning Approval from Host Country
- Blast Resistant Windows & FE/BR Doors and Windows
 - Government Purchased Equipment
- Updated Boundary & Topographic, Utility Surveys
 - Preliminary site development work done on selected 2006 projects
- Geo-technical Engineering
 - OBO will provide foundation system recommendations
- Perimeter Walls & Fences
 - OBO will provide foundation system recommendations
- Combined GSO Support Annex, Warehouse and Utility Building
- Order of Precedence





Overview of Changes Scope of Work

- All Buildings
 - Stone Cladding
 - OBO will indicate building size (Test Fit)
 - OBO will indicate foundation system
 - Balcony or Terrace Protection
- Blast & FE/BR Doors & Windows
 - Point of origin
 - Availability
- Deleted Design Adaptation Session
- VE Study done During Planning Phase of Project
- Design Process
 - New direction on how to use J documents





Includes:

- NEC Master Development Site Plan
- NEC Site Perimeter Plan
- NEC Conceptual Site Grading & Drainage Plan
- NEC Site and Building Sections
- Site Boundary, Topographic & Utilities Survey
- Preliminary Geo-technical Report
- Environmental Assessment (if applicable)
- Asbestos Management Report (if applicable)





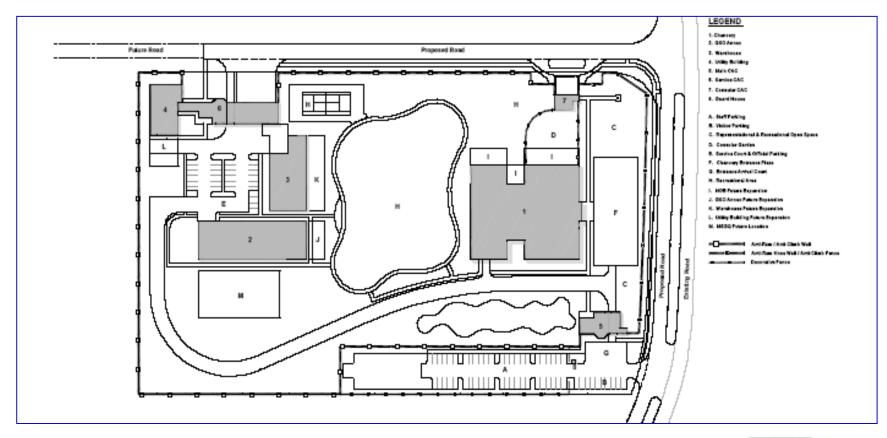
- NEC Master Development Site Plan
 - Illustrates all site components including all building footprints, landscape features, pedestrian and vehicle circulation, parking and all required setbacks.







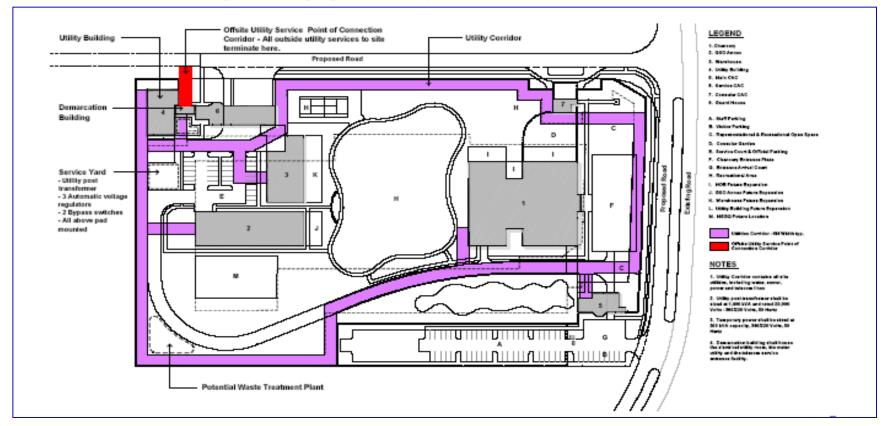
- NEC Site Perimeter Plan
 - Illustrates all perimeter walls, fences, knee-walls, bollards and all CACS







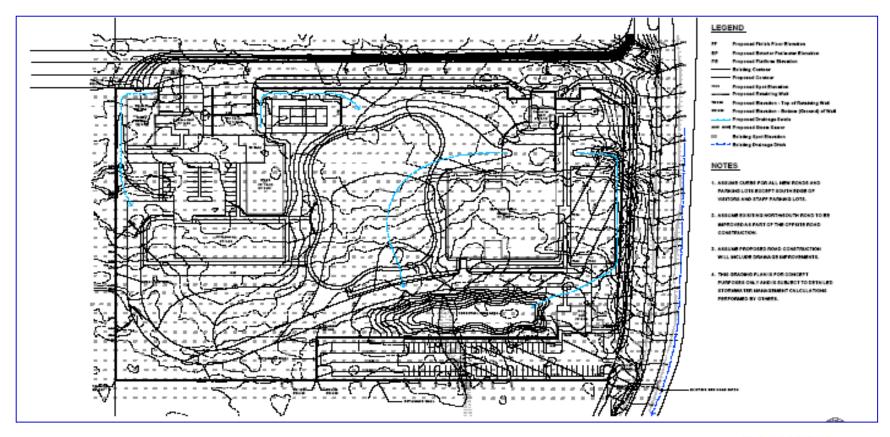
- NEC Site Utility Plan
 - Indicates location of electrical substation, water service, sewer line, storm water sewer, and telephone service connection points and proposed routing







- NEC Conceptual Site Grading & Drainage Plan
 - Indicates existing and proposed grades and all site features.







- NEC Site and Building Sections
 - Indicates building heights and massing.





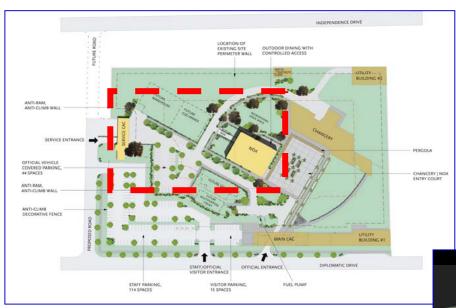


- NOB Level 1 Plan
 - Floor plan with room names, furniture layouts and major equipment

SBU Drawing Not Available







Abuja, Nigeria NOX





Questions





Overseas Buildings Operations

Management Information Forum Design Review Process

Brian Schmuecker





Design Review Process

Agenda

- Design Submittals
- Design Reviews
- Design Communications

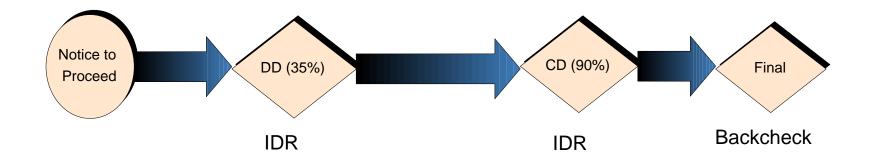




Design Submittals

In alignment with Industry Standards, Design Reviews have been reduced to:

- Design Development (35%)
- Construction Documents (90%)
- Final Backcheck







Design Submittals

Format:

- Electronic and Hardcopy
- Quantities
- Packaged by Office

		FY 06 SED Deliverable Requirements for DD & CD Submittals																													
		Deliverables															Ξ														
		Unclassified																Classified													
		Dra	win	gs		_	_	_	-			_	_		Fl-				_	_	_	_		Pres	ent	ation	n	Drawings			
		& Specs			Calculations, Reports & Finish Manual															Requirements					& Specs						
Individually packaged deliverables by OBO office listed below:	om Key	oom Key		port	port	dy	Report	acity		Report	ions	r	r Report	sport -	g Plan	Calcs	lations		t	ire		ings		s	ics	Cost	oom Key	tions	ions		
		Full Size Drawings/Room	Half Size Drawings/Room	Specifications	Code & Permit Report	Geotechnical Report	Water Supply Study	Domestic/ Pot. Water Report	Storage Tank Capacity	Site Report	Architectural/LEED Report	Structural Calculations	*** Blast Report	Mech/Plumb'g/Elevator Report	Energy Analysis Report	Draft Commissioning Plan	Electrical Report & Calcs	Fire Protection Calculations	QA Report	Signage Report	Product Literature	Finish Manual	Presentation Drawings	Renderings	Sample Boards	Model/3D Graphics	Updated Uniformat Cost	Half Size Drawings/Room Key	Classified Specifications	Classified Calculations	
CC-Project Exec			2	2	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	*	1	2	2	1	
CC/TSB Tech Support			2	1							8					2															
DE/DMB Design Mgr		1	1	H		B				B	B			H			B		a							*	1	1	1	1	
DE/ADB Arch			2	1	1					1	1					Œ				1	1	1						1	1	1	
DE/FPE Fire Protection			1		1				8							Œ		1			1										
DE/CSB Str/Civ/Geo/Bls	t		3	8	1	2	4	8	8		8	1	2																		
DE/EEB Elec/Tele/Shield	ı		3	B	1										1		1				1							3	3	3	
DE/MEB Mechanical			1	B	1		1	1	1	1	1			1	1	a					1							1	1	1	
DE/SEB Phys. Security			1	H						1																		1	1		
DE/ESB Archives		1		1	Г	П																						1	1	П	
DE/QA Coordinator				*															1											Г	
IF/OF-Interiors			1	Ħ							1									1		1						1	1	Г	
SM-Tech Security			2	a			П																				П	2	2	П	
DE/SP Special Proj			1							H	8	Ħ		H			ø											1	1	П	
DE/SP-ATO Hdqtrs			2			Т	Г			1	1			1			1										П	2	2	1	
PEA/CMB-Cost Eng		1		a	Т	Т	П			B	8	H		a			8	8									1	1	1		
FAC PS & MS Facil			2	2		Т								a	B	2	ø	8										1	1	Т	
DS/PSD/NOB-Phys Sec			3	3	Т	Т	Г			1	1		1					П									П	3	3	Г	
CSE (Rm 450)			1	1		Т	П			Т	8		П	B			B	B										1	1	Г	
IRM/LO-OBO Area Mgr			3	-	Т	T	T						П					П									П	2	2	Г	
IRM/CSA-LO Rep			1	П			П																					1	1	Г	
DTSPO Rep			1	П	\top	T	T		T														Т					1	1	F	
CA/EX-CA Rep (DD)			1																												
DIA Rep			1																												
MED Rep (DD)			1																												
2 copies CD-Rom for D Backcheck	D, CD, CD	х	х	х	х	х	х	х	х	х	х	х	х	х	х	х	х	х	х	х		++	х	**	++	*	х	х	х	х	
Total Design Developm Review - Hardcopies		3	36	11	6	3	2	2	2	6	5	2	4	3	3		3	2	2	3	5	3	1	1	1	*	3	26	26	8	
Total Construction Doo Review- Hardcopies	cument (CD)	3	34	11									4	3		5												26	26	7	
Total CD Backcheck- H (corrected documents		3	34	11																								26	26	7	

Typical Submittal Matrix





Design Submittals

Contractor's Responsibility:

Contractor's Quality Management Program Manager (QMPM) to Certify Submittal for:

- Quality Control
- Interdisciplinary Coordination
- Classification Review
- Certification (NEC)





Design Review Process

Agenda

- Design Submittals
- Design Reviews
- Design Communications





Design Reviews

Integrated Design Review is the review of design submittals that ensure that the appropriate level of effort, content and security has been integrated into our design and construction products. The IDR Process consists of two distinctive efforts:

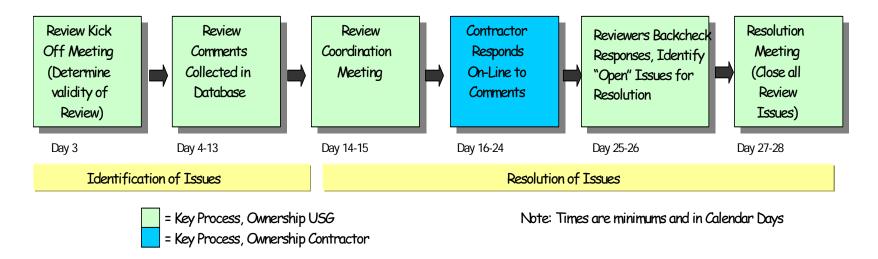
- Identify Project Design Issues
- Resolve Project Design Issues





Design Reviews

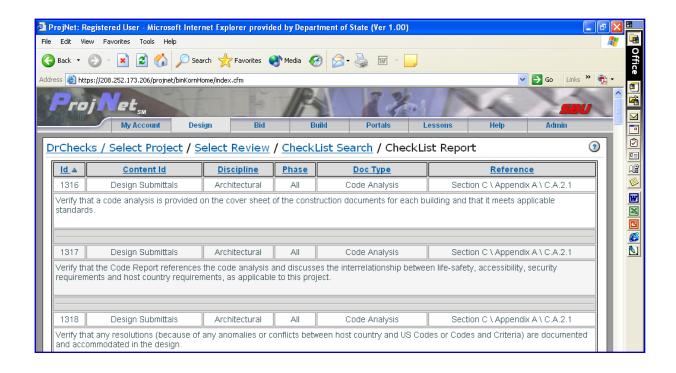
OBO's Integrated Design Review Process







Design Reviews



Design Review Checklist: Implemented to provide consistent and objective quality assurance (i.e. to discipline the process).





Design Review Process

Agenda

- Design Submittals
- Design Reviews
- Design Communications





Project Extranet = ProjNet

- Allows for secure data transmission of Project Design & Construction Information up to Sensitive but Unclassified (SBU).
- The use of ProjNet is for exchanging ALL data on DOS Projects between ALL partners.





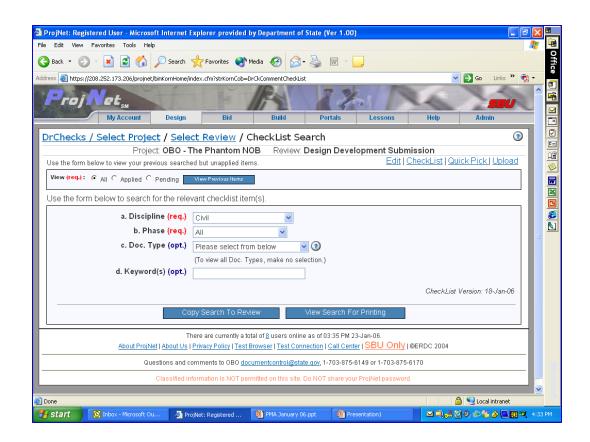
Agency Use of ProjNet(sm) Modules

	DrChecks (sm)	ProjNet-Filer (sm)	ProjNet-Bid (sm)	ProjNet-RFI (sm)	ProjNet-PlanRoom (sm)	DQLL (sm)	ProjNet-Portals (sm)
USACE							
NAVFAC							
NASA							
GSA							
DOS/OBO							
Army DPW							
US States							

No use by the agency
Partial or limited use
Used by entire agency



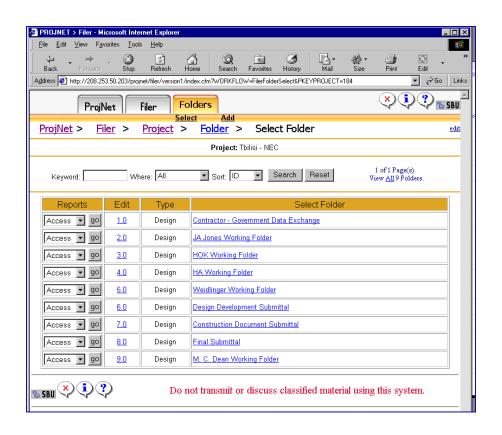




ProjNet: with Dr.Checks, was developed as Web-based communication, collaboration and tracking tool.







Filer: Supports the discreet, secure, and auditable exchange of Project Data up to SBU across the Internet.







Portals: Facilitate the publication and distribution to business partners of reference materials and guidelines.





Design Review Process

Summary

- Design Submittals
- Design Reviews
- Design Communications





Questions





Overseas Buildings Operations

Management Information Forum Frequency of Payments/Currency Fluctuation

William Colston





Frequency of Payments "Reliable Cash Flow"

- OBO has **moved**⁵ to *provide simple*, *clear and firm RFP language* for the payment process.
 - Sections G & I of the contract establish the payment terms.
 - Remittance Address
 - Number of copies needed
 - What to include in an invoice in terms of labor and materials
 - Where to submit EFT and ACH information
 - Contracts call for monthly progress payments.
 - Payments are made in accordance with Prompt Payment Act (PPA), which is 30 days after receipt of proper invoice or receipt and acceptance of goods and/or services.
 - Last year OBO paid 11,390 invoices worth \$888M in accordance with PPA, of these 6 were to our GC's with interest paid amounting to \$6.7K.





Frequency of Payments "Reliable Cash Flow"

- OBO will <u>look</u>⁸ for Project Directors who can create and maintain a strong team and <u>pay</u>⁹ more attention to the quality of the Design-Build team's on site staffing when it comes to invoicing and payments.
 - Close coordination between the Project Director and the contractor's field staff is vital to the timely processing of invoices.
 - Common mistakes to avoid: failure to certify subcontractor payments, mailing invoices to wrong address, invoicing for goods and services not yet accepted, incorrectly completed invoices.
 - OBO is not privy to any liens that IRS may have on a contractor, which could reduce the amount paid against an approved invoice by the U.S. Treasury.





Frequency of Payments "Reliable Cash Flow"

Web Sites:

Prompt Payment Act: www.fms.treas.gov/prompt/regulations.html

acquisition.gov/far/index.html

Central Contractor Registration www.bpn.gov

(location for vendor to provide EFT/ACH info)

Treasury PAID: www.fms.treas.gov/paid

(provides remittance information)

OBO/RM/FM/FO Vendor Payment Staff:

Janice Grenier, Branch Chief	703-875-5724	grenierje@state.gov
Carole Blake, Analyst	703-875-5726	blakecd3@state.gov
Gene Carr, Analyst	703-875-5027	carrgr3@state.gov
Laura Ngo, Analyst	703-875-5321	ngoll@state.gov
Wanda Shelton, Analyst	703-875-5725	sheltonwd3@state.gov
Jean Silverwood, Analyst	703-812-2246	silverwoodjd@state.gov





Currency Fluctuation & Valuation "Reward & Risk"

- OBO has **moved**⁵ to *provide simple*, *clear and firm RFP language* for currency fluctuation.
 - Section B of the contract states, "Nor will the contract price be adjusted on account of fluctuations in currency exchange rates."
 - Contracts are firm fixed price and are paid in U.S. Dollars.
- OBO has **moved**¹ to a true risk allocation process by assigning the benefit and risk of currency fluctuations to the contractor.
 - OBO has no control over exchange fluctuations.
 - Private sector has more tools at their disposal to mitigate currency fluctuation (*e.g.*, hedging).





Questions





Overseas Buildings Operations

Management Information Forum Schedule/Mobilization Process/NEC On-Site Construction Management

Yaseen Karaman





Schedule



"Schedule should be realistic"

- OBO has **moved**⁵ to *provide simple*, *clear and firm RFP language* for the scheduling requirements.
 - Provide schedules in an electronic format only.
 - Activity coding for the Project Execution Schedule should match the UNIFORMAT coding.
- •OBO will <u>pay</u>⁹ more attention to the quality of the Design-Build team's on site staffing to provide:
 - A schedule that is the product of the on site management team including sub-contractors to reflect realistic conditions.
 - A schedule that its only purpose is NOT just a billing tool, but a tool that all can use to realistically monitor progress.
 - A schedule that is based on realistic resource loading.
 - A schedule that is constantly and consistently updated to reflect realistic and actual conditions for better tracking and management of problems if and when they occur.





The Mobilization Process



"The Golden Opportunity"

The Design-Build process provides a golden opportunity for any contractor to be fully prepared for the start of the major work items.

To enhance Limited Notice-to-Proceed mobilization:

- •OBO will **deliver**¹¹ a building site ready for construction.
 - Upon NTP, contractor sets the schedule for progress and schedule.
 - Early submission of the Site Utilization Plan (SUP) will facilitate the mobilization process.
 - Once the SUP is finalized, the Contractor can begin to perform numerous preparatory work items: SSA, ACF, field offices, shops, temp. warehouses, perimeter fence, batch plant setup if needed, equipment mobilization, some site grading etc.
 - The opportunity is also open to start some unclassified structures and some infrastructure work depending on design progress.
 - The opportunity is open to finalize local contractors and processing personnel clearances.

•To enhance Full Notice-to-Proceed mobilization:

- OBO will <u>make</u>¹² the Standard Design (SED) a true "Site adaptation" vehicle.
 - •On average, site mobilization is currently starting 4 to 5 months after contract award with a lot of energy and time devoted to the design process and trying to reach project certification, missing the opportunity to mobilize as early as possible.
 - •Prudent use of the mobilization period available, will enable the contractor to focus their energy on the critical path construction items without being sidetracked.





How we Manage the NEC construction site



"Emphasis on Consistency"

- OBO has <u>moved</u>¹ to a true risk allocation process by changing the requirements for the on-site staff requirements clearance level.
 - Four secret clearance level staff are now required instead of six
 - Presence of the cleared Americans on site is more flexible as indicated in Division 1, Section
 - 01101, paragraph 1.7.B
- OBO will **look**⁸ for Project Directors who can create and maintain a strong team:
 - That is highly experienced and trained in a uniform manner so as to reflect more
 - consistency in the management of the projects.
 - That will implement an open and consistent channels of communication between the parties
 - to facilitate information exchange and issue resolution.
- OBO will <u>deal</u>¹⁶ appropriately with change orders in an expedited, consistent manner and agreed upon time frames.
- OBO will <u>pay</u>⁹ more attention to the *quality of the Design-Build team's* on site staffing to ensure better management and better performance.
- OBO has <u>added</u>¹⁹ a *commissioning staff requirements* to the on site team to highlight the importance of this function. The team will monitor and manage the commissioning process starting with Kick-Off meeting preceding construction start and continuing till project completion.





Questions





Overseas Buildings Operations

Management Information Forum Cleared American Guard/Construction Surveillance Technician Requirements

Robert Soule



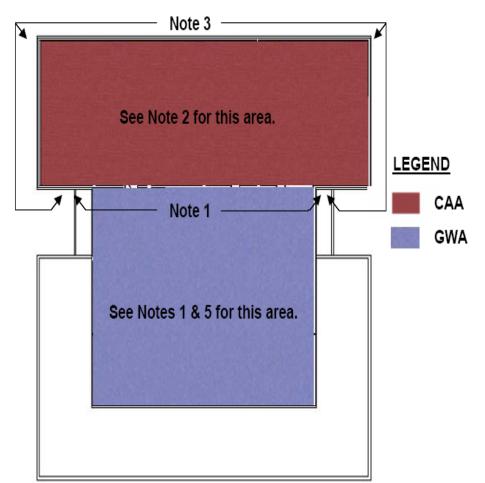
Cleared American Guards, Cleared American Labor & Construction Surveillance Technicians "Who, Where & Why"

- The requirements for cleared American labor and oversight are driven by Public Law 100-204 enacted December 1987.
- Division 1, Section 01141 for each Request for Proposal (RFP) defines those current requirements.
- Beginning in FY 2004, the labor requirements were revised:
 - Cleared Americans are required for all CAA Finish Work.
 - Cleared Americans are required for all finish work on building exterior surfaces adjacent to the CAA.
 - The term "adjacent" is used consistently to describe the exterior walls and roof that are common with the CAA walls and ceilings.
 - Uncleared labor under surveillance by CSTs may perform finish work on building interior areas contiguous to the CAA.
 - The term "contiguous" is used consistently to describe the building interior walls and ceilings that are common to the CAA interior walls and floors.



Labor Requirements Diagram Third Floor





NOTES:

- BUILDING INTERIOR AREAS CONTIGUOUS TO THE CAA: General Construction and Finish Work by uncleared labor under surveillance by CST's.
- CAA:
 - General Construction by uncleared labor under surveillance by CST's.
 - Finish Work by Secret cleared Contractor provided labor.
- 3. BUILDING EXTERIOR SURFACES ADJACENT TO THE CAA (INCLUDING PARAPET): Finish Work to include the installation of all finish components including the final or outermost items that are exposed to the elements, by Secret cleared Contractor provided labor. Finish components include but are not limited to membranes, anchors, hangers, channels, insulations, framing, sheathing, sills, glazing, stucco, stone panels, etc.
- 4. ROOF SURFACES ADJACENT TO THE CAA:

 Finish Work to include the installation of all finish components including the final or outermost items that are exposed to the elements, by Secret cleared Contractor provided labor. Finish components include but are not limited to: membranes, flashings, built-up roofing, insulation, hatches, skylights, gravel, soil, landscaping items, roof penetrations and equipment mounting, and equipment pads and platforms, etc.
- GENERAL WORK AREA (GWA): General Construction and Finish Work by Uncleared labor.

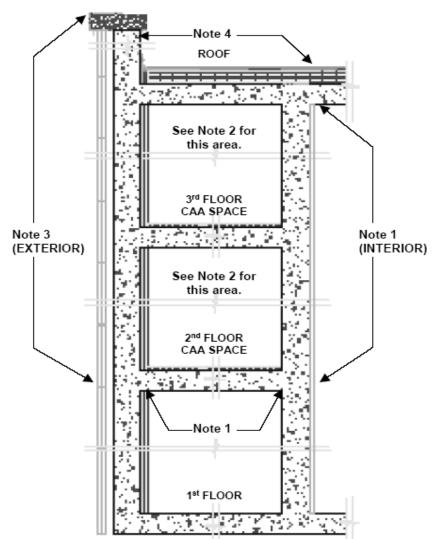
THIRD FLOOR TYPICAL PLAN (site specific details may differ)





Labor Requirements Diagram Details





Detail not to scale (site specific details may differ)

NOTES:

- BUILDING INTERIOR AREAS CONTIGUOUS TO THE CAA: General Construction and Finish Work by uncleared labor under surveillance by CST's.
- CAA:
 - General Construction by uncleared labor under surveillance by CST's.
 - Finish Work by Secret cleared Contractor provided labor.
- BUILDING EXTERIOR SURFACES ADJACENT TO
 THE CAA (INCLUDING PARAPET): Finish Work to include the installation of all finish components including the final or outermost items that are exposed to the elements, by Secret cleared Contractor provided labor. Finish components include but are not limited to membranes, anchors, hangers, channels, insulations, framing, sheathing, sills, glazing, stucco, stone panels, etc.
- 4. ROOF SURFACES ADJACENT TO THE CAA: Finish Work to include the installation of all finish components including the final or outermost items that are exposed to the elements, by Secret cleared Contractor provided labor. Finish components include but are not limited to: membranes, flashings, built-up roofing, insulation, hatches, skylights, gravel, soil, landscaping items, roof penetrations and equipment mounting, and equipment pads and platforms, etc.





Questions





Overseas Buildings Operations

Management Information Forum FEBR Procurement and Delivery

Koby Stoll

May 25, 2006







- OBO has **moved**¹ to *share the risk* on the long-lead/critical path FE/BR products for the NEC campus (NOB, CACs, MSGQ, and GSO office buildings)
 - To help the D/B Contractors, beginning with FY05 NEC awards:
 - OBO made 12 a standardized list of FE/BR products tied to the SED
 - OBO purchased & provided f.o.b. origin the following GPE products:
 - FE/BR Doors & Windows
 - Muntin window for upper floors and MSGQ
 - Vault doors (Class V)
 - OBO will **not** provide FE/BR Louvers and Roof Hatches
- OBO has moved 13 to standard design FE/BR shop drawings for GPE products
 - GPE shop drawings are shared and available through the ProjNet Portal
 - D/B contractor provides the following information at Design Development
 - 100% FE/BR door & window schedule w/GPE product numbers
 - Paint colors of all painted-finish items identified in the GPE shop dwgs
 - Scheduled pick-up dates for embeds and inserts

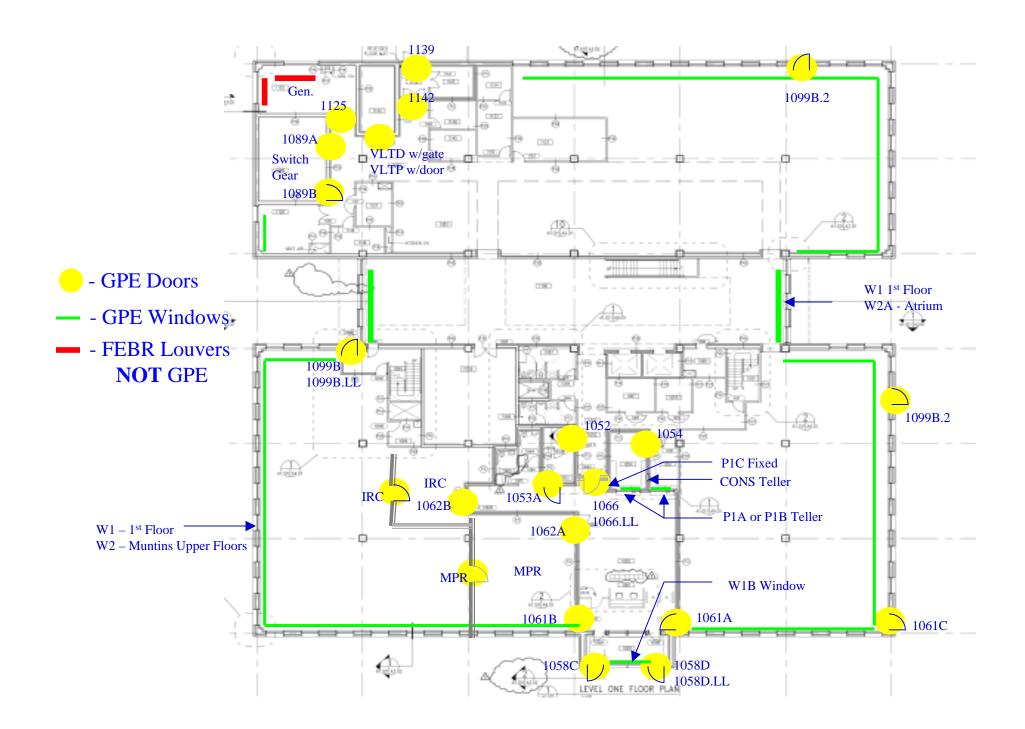


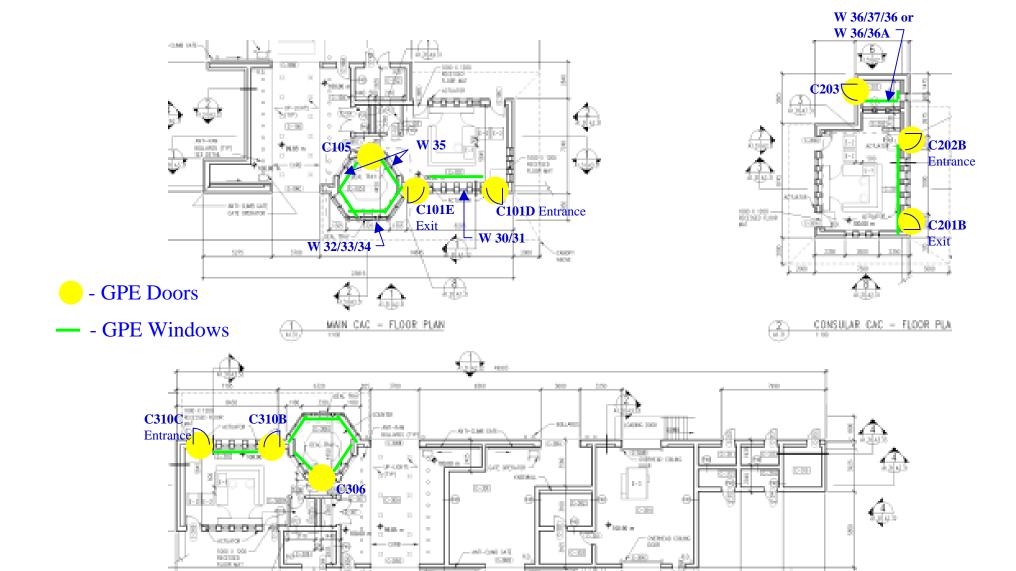




- OBO has **moved**¹ to *share the risk* on the long-lead/critical path FE/BR products for the NEC campus (NOB, CACs, MSGQ, and GSO office buildings)
 - To help the D/B Contractors, beginning with FY05 NEC awards:
 - OBO made 12 a standardized list of FE/BR products tied to the SED
 - OBO purchased & provided f.o.b. origin the following GPE products:
 - FE/BR Doors & Windows
 - Muntin window for upper floors and MSGQ
 - Vault doors (Class V)
 - OBO will **not** provide FE/BR Louvers and Roof Hatches
 - OBO will **not** provide GPE for annex office buildings











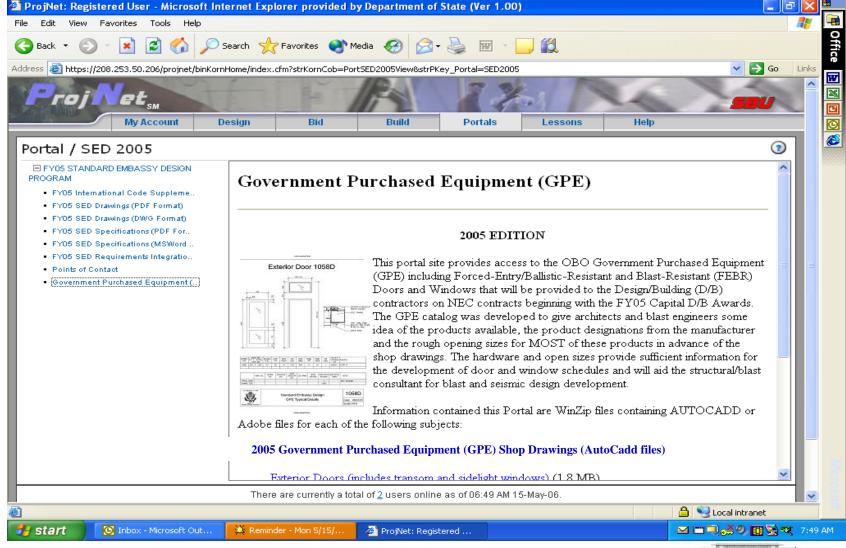
- OBO has **moved** 13 to <u>standard design</u> FE/BR shop drawings for GPE products
 - GPE shop drawings are shared and available through the ProjNet Portal
 - D/B contractor provides coordinated FEBR door & window schedule at Design Development or as an Interim Review
 - 100% FE/BR door & window schedule w/GPE product numbers
 - Paint colors of all painted-finish items identified in the GPE shop dwgs
 - Scheduled pick-up dates for embeds and inserts





Government Purchased Equipment (GPE) ProjNet Portal











- OBO has **moved** 13 to <u>standard design</u> FE/BR shop drawings for GPE products
 - GPE shop drawings are shared and available through the ProjNet Portal
 - D/B contractor provides coordinated FEBR door & window schedule at Design Development or as an Interim Review
 - 100% FE/BR door & window schedule w/GPE product numbers
 - Paint colors of all painted-finish items identified in the GPE shop dwgs
 - Scheduled pick-up dates for embeds and inserts







The how - who of FEBR & Blast Products for NEC Construction

- ✓ Coordinated Schedule & Markings
- ✓ Exterior Window Frame Color
- ✓ Interior Loose Stop Cover Color
- ✓ Interior Door Color
- ✓ Interior Door Swings
- ✓ Schedule for GPE shipments (One for doors & One for Windows)

GPE / SED UNIT NUMBER

	•														
														D	OOR
			DOLLO!	LODINO		DOOR									
			RUUGE	1 OPNG			DOOR SIZE								
DOOR NO.	GF 1 Unit (F Tag)	DOS CODE	w	нт	PAIR	w	нт	Т	TYPE	SWING	GLASS TYPE	MATL	FINISH	TYPE	PROFILE
1000	1058B	1123	1036	2446	_	915	2395	63	D7	RHR	_	STL	8.8	F5	STL 1
1000A	1058A	1123	1036	2446	_	915	2395	63	D7	RHRB	_	STL	8.8	F5	STL 1
1001	_	_	_	_	_	915	2135	45	_	_	_	SCWD		_	HM
1001A	_	_	_	_	_	915	2135	45	_	_	_	SCWD	_	_	HM
1001B	1068C	1123	1036	2186	_	915	2135	63	D7	RHRB	_	STL	S.S	F6	STL 1
1012	_	_	_	_	_	915	2135	45	_	_	_	SCWD	_	_	HM
1013	_	_	_	_	_	915	2440	45	_	_	_	SCWD	_	_	HM
1013A	1099B	2123	1036	2186	-	915	2440	63	D1	LHRB	-	STL	8.8	F1	STL 1
1100	1053A	2123	1036	2186	-	915	2135	63	D1	RHRB	_	STL	8.8.	F6	STL 1
1100A	1052.1	2123	1036	2186	-	915	2135	63	D1	RHRB	-	STL	Р	F1	STL 1
1100B	_	3111	_	_	_	915	2135	45	D1	RHRB	_	SCWD	_	F1	HM
1101	1054.1	1123	1036	2188	_	915	2135	63	D9	RHRB	_	STL	Р	F1	STL 1
4400			l			0.4 6	9496	AE	l	l		OCHMIN			LIKA





Questions





Overseas Buildings Operations

Management Information Forum Change-Order Management

Tom FitzPatrick





Change Order Management



"Prevention, People and Process"

- OBO has <u>moved</u>¹ to share the risk, will <u>avoid</u>² non-traditional SOW, will <u>represent</u>⁴ clearly "Rights of Passage", will <u>fix</u>¹⁰ customer expectations and <u>move</u>¹³ to a standard design equaling approved CDs in an effort to eliminate changes.
- OBO will <u>look</u>⁸ for *Project Directors who will maintain a strong team* and insure consistency in the interpretation of contract documents.
- OBO will <u>pay</u>⁹ more attention to the contractor's on-site staff to insure they have the credentials to clearly execute the terms of the contract.
- •OBO will **deal**¹⁶ appropriately with Change Orders.
 - Issue Request for Proposal when change is identified.
 - Issue modification at field level if within the Project Director's warrant (<\$25,000).
 - Coordinate with CO to issue mod within <u>30 days</u>.
 - For REAs:
 - A/LM will provide written response acknowledging receipt of the request and indicating whether or not sufficient information has been provided for the USG to evaluate.
 - PE/CC will forward recommendation to CO within <u>25 days</u>.
 - If REA decision finds merit, then issue mod within <u>30 days</u>.
 - Contractor can request review by OBO/PE and/or A/LM.
 - Contractor and/or OBO can request <u>Alternate Dispute Resolution</u>.





Questions





Overseas Buildings Operations

Management Information Forum Operations/Maintenance Deliverable Package

Chuck Fanshaw





Operations & Maintenance Deliverables



"Emphasis on OBO & Contractor Teamwork"

Design Phase:

- Commissioning requirements and qualifications of the Commissioning Authority
- Emphasis on Commissioning Plan and early involvement
- •Construction Phase:
- OBO and Contractor must give **consideration**¹⁸ on the "how-to" for O&M deliverables
- Contractor will \underline{add}^{19} a commissioning staff to the on-site team and ensure that this staff is an active participant in the PRE-CON
 - Designation of commissioning staff personnel by Contractor with emphasis on O&M as a way of thinking not simply a requirement. Goal: Smooth, high quality project turnover (Contractor to OBO to Post) and reliable facility operations!
 - Changes for 2006: Earlier O&M manual development and local staff training
 - Direct communication path to the Project Director
 - Detailed equip list w/contractor furnished extra materials list 9 months before SC date
 - Updated Cx plan/schedule submitted 8 months before SC date
 - Maintenance & Training Plan, O&M Manuals, spare parts list 6 months before SC date
 - Training (formal and hands on) 2 to 4 months before SC date
 - Maintenance plan running in the work order system (WOW) <u>2 months before SC date</u>
 - Commissioning report, as-built drawings & record documents 1 month before SC date
 - Warranty manager mobilized and warranty book complete Post move-in





Questions





OBO's Management Information Forum Forum Summary

	Issue	Risk Allocation
•	Security Stewardship	(OBO & Contractor)
•	Site Conditions	(OBO)
•	Host Country Approvals	(OBO)
•	Schedule Duration – 15-28 Months	(Contractor)
•	RFP Discipline	(OBO)
•	Currency Fluctuation	(Contractor)
•	Timely Submittals	(Contractor)
•	Design Changes (outside the SED)	(OBO)
•	Design Review Delays	(OBO)
•	Construction Permit	(Contractor)
•	Timely Responses to RFI	(OBO)
•	Change Order Management (schedule)	(OBO)

Read the Contract – OBO & Contractor





View this presentation at:

www.state.gov/obo

